



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



## SETTING UP YOUR UNIT FOR THE SCOUTBOOK YOUTH ADVANCEMENT SYNC

The Scoutbook Database will become the database of record for all advancements in the BSA very soon. The first step in getting there for Scoutbook users is to activate Youth Advancement Sync.

Activating the advancement sync is very easy. This guide has a lot of troubleshooting information in it if you run into any issues, so it is longer than normal. Don't let that scare you away. Follow the 4 steps and you will do fine. We have synced thousands of units so far.

Scoutbook will automatically sync advancements with MyScouting/Akela and ScoutNet/PAS (the BSA Council Tools)

Activating your unit for Advancement Sync is a one time process. You only have to do it once. There is no reason to wait for Recharter.

This change eliminates the necessity of generating a .csv file from Scoutbook, logging into Internet Advancement and uploading the file. There is no longer a need to access Internet Advancement for this Unit.

Your advancement records, when approved in Scoutbook will be recorded at the BSA and your local council will see them in their ScoutNET system. Allow a day for the data from Scoutbook to appear in ScoutNET, however you can purchase your advancements right away. If it is in Scoutbook, and the Scout is synced, then the record is officially recorded with the BSA. You will be able to print the Advancement Report from Scoutbook to obtain the advancements at the Scout Shop.

This first phase is only syncing youth advancement records.

Since the council tools only track completed and signed off advancements; only 'approved' advancements will transfer from Scoutbook to the tools. Partial completions, and items only marked completed and not approved will continue to be tracked only via Scoutbook.

When there is an approved change in an advancement in Scoutbook, it will be reflected in the council records. When the council records change it will be reflected in Scoutbook. The record with the most recent update date will take preference.

Advancements that require District, Council or National approval will not be uploaded from Scoutbook; instead they will flow from ScoutNet through to Scoutbook.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



## To Setup Your Unit

DO NOT DO A SCOUTNET IMPORT – Only use it one time when initially creating your unit in Scoutbook. Otherwise, it could bring in duplicates or Scouts who were on your charter prior to rechartering and cause confusion.

**Some of the steps in the setup must be performed by a currently registered Key 3 member or Key 3 Delegate who is also setup in Scoutbook as either a Pack Admin, Troop Admin, or Crew Admin. Key 3 member is not a position in Scoutbook and you will not see 3 keys in Scoutbook. It is a BSA term for a currently registered unit leader (Scoutmaster, Cubmaster, Crew Advisor) or a Committee Chairman, or a Chartered Organization Representative.**

Make sure you have entered your BSA Member # into your profile and setup yourself as a Key 3 and Scoutbook Pack or Troop Admin<sup>1</sup>. Make sure you appear on the current BSA charter as a Key 3 member. You can check this through Member Manager on the my.Scouting.org website. When you activate advancement sync, all approved Scouts in your Scoutbook roster will be setup for the sync. If you wish not to include a Scout in the sync, make sure their Scoutbook account is marked as 'unapproved<sup>2</sup>.'

When you wish to setup your unit for the advancement sync, log into Scoutbook and go to the **Pack, Troop or Crew page** in Scoutbook by logging in, clicking on My Dashboard, then Administration, then click on your pack, troop or crew under My Units. If you are a pack admin, you will see Edit Pack in the menu on that page. Select **Edit Pack (or Troop or Crew.)**

---

<sup>1</sup> In Scoutbook, go to your Dashboard. Click Administration, Click My Account. Click My Positions. Make sure you have two positions listed for your unit with green shield/check marks next to them: Pack (troop or crew) Admin and the Key 3 role (e.g., committee chair.) If not, add the position. Any current Pack or Troop admin can add you as a pack or troop admin (check your Scoutbook Roster for who those are.) If it is there but does not have the green shield/checkmark then open it and click the Accept the Position box and update it.

<sup>2</sup> To unapprove a Scout that is currently approved; click on their name, click on the Membership area then click on the entry under your unit type and number. Uncheck the Position Approved box at the bottom of the screen and click update.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



When you go to the edit page you will see the following instructions at the bottom of the page.

### BSA Advancement Sync

Congratulations! Your unit is now eligible to take part in the BSA Advancement Sync.

**What is the BSA Advancement Sync?**  
Advancement sync allows your unit to approve advancement in Scoutbook and have it automatically sync with the BSA national database. Once your unit is setup for the sync you will no longer need to use **Internet Advancement**.

**Steps to get setup**  
The following steps must be completed before activating the sync (click on each step for more information):

<input checked="" type="checkbox"/>	Unit Setup
<input checked="" type="checkbox"/>	Key 3 or Key 3 Delegate
<input type="checkbox"/>	Verify yourself
<input type="checkbox"/>	Verify Scout Roster

I have communicated with the troop committee and Scoutbook.  I am in agreement to activate advancement sync in

Activate Sync

When you start this activation process, one or more steps may already be marked complete based upon previous actions taken by your Unit and its Leaders. Only steps without a green check still need to be completed.

As each of the steps are satisfied you will receive a green check mark next to its name. Clicking on any of the descriptions will provide you with instructions for that step. As each item on the check list is completed, Scoutbook will detect the status and automatically check it off the list. You have to have all the steps complete before you can activate the sync. **Step 4 (Verify Roster) normally takes the longest, and can be done first.**

The checks are as follows: Do them in any order you like:

- ✓ **Unit Setup: (This step may be done by any Scoutbook Unit Administrator)** For this check mark to appear:
  - a. You must have a current paid unit subscription
  - b. In Scoutbook, on the Edit Troop or Edit Pack page you have the correct Troop, charter organization and council at the top of the page. If not, send an email to [Scoutbook.support@scouting.org](mailto:Scoutbook.support@scouting.org) to have it cleared out so you can select the correct one.
  - c. With at least 3 active Unit Administrators, (e.g., 3 Troop Administrators or 3 Pack Administrators); each one have signed in at least once. Pack or Troop Administrator is a position in Scoutbook, edit an adult's leadership positions to assign them to this role. Make sure the position approved box is checked.
  - d. Make sure each of the three troop or pack administrators have a green shield next to their name on the roster. If not, edit the person's leadership position and make sure the Position Approved box is checked.
  - e. Your unit must be properly matched with a current BSA unit roster (chartered with the proper chartering organization listed.)



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



- f. Make sure that the Charter Expiration Date in the Edit Pack or Edit Troop unit page shows a date that is in the future (you can edit the date.)
- ✓ **Key 3 (This step must be done by a Key 3 member or Key 3 Delegate):** Scoutbook will check to see if you are a registered Key 3 member or Key 3 Delegate in your unit<sup>3</sup>. Setup must be performed by a currently registered Key 3 member, which is a BSA term for a registered Unit Leader (i.e., Scoutmaster, Cub Master, Varsity Coach, Venturing Advisor, or Skipper) Committee Chair, or Chartered Organization Representative or Key 3 Delegate for the unit being synced. Scoutbook unit administrators can activate any additional Scouts that join the unit after the initial activation occurs. (NOTE: if you are just made a Key 3 delegate, allow 24 hours for Scoutbook to recognize the change. Also note that Scoutbook does not place 3 keys next to the names of key 3 members, it only shows their position in the roster.)

If you run into problems at this step here are some things to look into:

- a. Make sure you have entered your BSA Member # into your profile and setup yourself as a key 3 (i.e., Scoutmaster, Cubmaster, Advisor, Committee Chair or COR) in the Scoutbook roster.
- b. In Scoutbook, on the Edit Troop or Edit Pack page you have the correct council at the top of the page. If not, send an email to [Scoutbook.support@scouting.org](mailto:Scoutbook.support@scouting.org) to have that changed to the proper council.
- c. Make sure you have a green check mark next to your name in Scoutbook for your key 3 position. If not, go into My Positions and accept the position (or your unit admin can approve your position.) This is in addition to your unit administrator position, which is a separate position.
- d. If you are a Key 3 member: make sure you appear on the current BSA roster as a key 3 member with the same membership number you are using in Scoutbook. You can check this through Member Manager<sup>4</sup> or your profile on the my.Scouting.org website<sup>5</sup>. If not, change the number in Scoutbook to match your unit roster. Contact your council service center if you do not show as a key 3 member on your unit roster.
- e. Check the Manage Member ID tool: log onto <http://my.scouting.org> from the pull-down menu and go to Legacy Tools; then Manage Member ID. Make sure the member ID that is in Scoutbook is there and is set to Primary. If not, add it and set it as Primary.
- f. If after trying the steps above, you are still having difficulty, send an email to: [scoutbok.support@scouting.org](mailto:scoutbok.support@scouting.org) explaining your issue, and the account names involved.

---

<sup>3</sup> How a Key 3 member delegates someone to be a Key 3 Delegate: A registered Key 3 member logs onto <http://my.scouting.org> They Click on the Menu in the upper left They select their unit They select Organization Security Manager They select Key 3 Delegate They click on the green plus sign and select the name of the person they wish to be a delegate from the pull down. Put an expiration date in and click save. Scoutbook will see the change the next day. (Allow 24 hours for Scoutbook to recognize the change.)

<sup>4</sup> Log into <http://my.scouting.org> - Click on the menu in the upper left; Click on your unit then Click on Member Manager.

<sup>5</sup> To find your profile in myscouting.org: log into <http://my.scouting.org>, click on Menu, then My Dashboard, then on the three parallel lines under menu, then My Profile. Check to see if you have any active positions. One needs to be one of the unit key 3 positions (if not, contact your local council to correct.)



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



- ✓ **Verify Yourself (This step must be done by a Key 3 member or key 3 Delegate):** Scoutbook will ask you for your login credentials for my.scouting.org to verify the person setting up the sync is who they say they are.

If you run into problems at this step here are some things to look into

- a. If Scoutbook says that it can't verify you, but you can log into MyScouting Tools <http://my.scouting.org> fine with your login and password, make sure your current membership ID that on your BSA roster is the same as in your profile in MyScouting tools and Scoutbook. And your profile in my.scouting.org shows you as registered in one of the key 3 positions. Your BSA roster can be found in Internet Advancement, in Member Manager at <http://my.scouting.org> or by calling your council Registrar.
  - b. If it does, check the Manage Member ID tool: log onto <http://my.scouting.org> from the pull-down menu and go to Legacy Tools; then Manage Member ID. Make sure the member ID that is on your unit roster is there and is set to Primary. If not, add it and set it as Primary.
  - c. If after trying the two steps above, you are still having difficulty, send an email to: [scoutbok.support@scouting.org](mailto:scoutbok.support@scouting.org) explaining your issue, and the account names involved.
- ✓ **Verify Scout Roster (This step may be done by any Scoutbook Unit Administrator):** Make sure all Scouts on your Scoutbook roster match those found on your official BSA unit roster. The BSA Member # must match. You can get membership numbers off of your roster in Internet Advancement or Member Manager at <http://my.scouting.org> You do not need to have all the Scouts that are on the council roster in your Scoutbook Roster to sync. You are in complete control of which Scouts in Scoutbook you sync and which you do not. Just unapprove any Scout you do not wish to sync and the sync routine will ignore them.

If you run into problems at this step here are some things to check:

1. Look at the roster in Member Manager in the menu under your unit name in MyScouting Tools ( <http://my.scouting.org> ) and make sure it is for the same unit you are trying to activate for the sync.
2. The member ID in the Scout's profile in Scoutbook and at least the First Name or Last Name matches the one in the MyScouting Tools' roster<sup>6</sup>. Also try removing the member ID in the Scout's profile in Scoutbook, updating the profile and adding the number back in.
3. It has been at least three days since any new Scouts added to your MyScouting Tools roster before attempting to activate them for the sync.
4. If you get an error that the Scout is not on the unit roster, check to see if the Scout is on the roster in Member Manager<sup>6</sup>, if not, then unapproved the scout and sync the unit (see the next step.) Contact your council service center to register the Scout. You can add them to the sync later.
5. If you get an error that the Scout is not on the unit roster but he is on the roster in Member Manager, edit their profile and erase and retype their membership ID and update. If you get an error that the member number exists, see step #7 below

---

<sup>6</sup> To find BSA numbers in myscouting.org, do the following (you have to be a key 3 member or delegate to do this:) Log into <http://my.scouting.org> - Click on the menu in the upper left; Click on your unit then Click on Member Manager Click on Youth - Above the youths' names are 2 rectangles, the one to the right is the Youth Member Age Report. click on that one it will give you a PDF with all the youth members and their membership IDs.



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



6. **If you have a Scout who is not officially on your council roster in my.scouting.org, or is currently inactive and you do not want to track in Scoutbook, you can still activate the sync for your unit.** Un-approve these scouts by clicking on the Scout in your Scoutbook roster, click on the menu item [Scout]'s Membership, Click on your unit under Current Membership and then uncheck the position approved box click update. Also go into the Scout's Leadership area and end any leadership positions the Scout has. The Scout will stay on your roster, but you can then sync the rest of the unit. Also contact your local council registrar at your council service center to have them added to your official roster. Then when they are in your official roster, you can add their membership ID to their profile and approve them in their membership area. Then you will get a prompt to add them to the sync. In the meantime, the rest of your unit will be in sync. You can also opt to re-approve the Scout and not sync for the Scouts not yet in the official unit roster. This will give you the ability to track them while waiting for them to be registered and to sync.
7. **If you encounter a Scout where Scoutbook says that another Scout in the system already has that member ID, send an email with the details to: [Scoutbook.support@scouting.org](mailto:Scoutbook.support@scouting.org) include the Scout's name, member ID and your unit information and council name.**

**These last actions must be done by a Key 3 member or Key 3 Delegate:**

When you have completed all the items, click on the "I have communicated with the unit committee ...." Box and then click on Activate Sync and the sync will be activated for your unit.

Scoutbook will tell you immediately that you are sync'd. When your unit is sync'd you will see an A with a circle around it next to each scout who is sync'd. Also, if you go into your Edit unit page, you will see under your unit title the line: *This unit was setup for BSA Advancement Sync by ...*

*After you log off and on again, your unit will display in your dashboard with a sync symbol next to it (an A with two arrows around it), like this:*



*And every Scout that is in sync will show with the symbol along side their name in your Scoutbook roster, like this:*



**AT THIS POINT YOU HAVE ACTIVATED THE ADVANCEMENT SYNC**

### **Unit Advancement Report That You Take to the Scout Shop**

The report you hand into the Scout Shop is the Unit Advancement Report. After approving the awards and advancements, go to the unit page and under reports select the Needs Purchasing Report. It will allow you to select the some or all the advancements to include in a PO (which is a shopping list.) When you open the PO, you will see a



For the LATEST VERSION of this document as well as many other Help Documents and Resources please visit the Scoutbook User Advisory Council's **RESOURCE DIRECTORY** at: [bit.ly/scoutbook](http://bit.ly/scoutbook) ...



shopping list for what to get at the Scout Shop. The report the Scout Shops are looking for is called the Unit Advancement Report and a button to generate this report is at the bottom of the PO page.

**FREQUENTLY ASKED QUESTIONS ABOUT THE SYNC** can be found here: <http://bit.ly/advsyncfaq>